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ABSTRACT

This handbook outlines 10 steps in developing a training plan for Head Start. The introduction defines training and lists the benefits of a training plan. The bulk of the handbook consists of a detailed description of the 10 steps for development of a training plan, including each step's purpose, directions to accompany work sheets, and questions for discussion. The steps described are intended to: (1) "Determine Needs of the Program and Organization"; (2) "Describe Expected Outcomes of Training"; (3) "Set Training Priorities"; (4) "Identify Training Options, Resources Available, and Cost Estimates"; (5) "Develop a Budget and Allocate Funds"; (6) "Prepare the Final Training Plan"; (7) "Carry Out the Training Plan"; (8) "Evaluate the Staff Development Event"; (9) "Provide Follow-Up"; and (10) "Evaluate the Training Plan." (BGC)

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DEVELOPING A HEAD START TRAINING PLAN

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U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES
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Head Start Bureau

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PREFACE

On January 12, 1994, Health and Human Services Secretary Donna E. Shalala presented recommendations to improve, expand, and reform America's Head Start program. These recommendations were contained in the Final Report of the Advisory Committee on Head Start Quality and Expansion, "Creating a 21st Century Head Start."

The Advisory Committee stated in its report that "the quality of services must be a first priority." Step One toward achieving this goal, according to the Advisory Committee, is to focus on creating a learning community within Head Start that supports ongoing training and staff development. The Committee highlighted the following principles:

- All staff should have the knowledge and expertise required to fulfill effectively their job responsibilities
- Continued efforts should be made to recruit staff from the community and to develop the skills needed in the community
- Training should be ongoing and structured to include observation and feedback
- Whenever possible, training should be linked to college credit and should lead to degrees or other recognized credentials
- Training and resources should be made available to support a differentiating staff model with various levels of qualifications, roles, responsibilities, and compensation
- All staff should take initiative and personal responsibility for their own professional growth and should be offered ample opportunities and support for career advancement

To implement these principles, the Advisory Committee stated that "Every Head Start program should have a staffing plan that addresses staff qualifications, job descriptions, staffing levels, . . . and linkages to education and training that will allow staff to advance through various roles with increasing levels of responsibility and compensation" (p. 25). Specific recommendations include:

- Provide national leadership in developing and implementing staffing plans

- Develop a "qualified mentor" program to provide observation, feedback, and support to classroom staff, home visitors, and family service workers
- Establish competency-based training for staff who work directly with families, to ensure that staff have the key skills required to provide quality services
- Strengthen the availability of training and career development opportunities at the local level, to ensure that all Head Start staff have the opportunity and financial support to pursue education, training, and career development that will ultimately benefit children and families

Learning in Head Start should be an ongoing process, and one that is available in a variety of ways to everyone in the Head Start community. The step-by-step approach to developing staff training plans outlined in this handbook will assist Head Start grantees in defining their program and staff needs, their operating environment, and the steps that should be taken to better achieve their program goals. As training enhances the capabilities of Head Start staff, the quality and creativity in interactions between staff and children and parents will be assured.

Author's Note

People use a variety of terms to describe staff training, including staff development and learning opportunities. All of these terms are used interchangeably throughout this handbook, in an attempt to reflect the diversity of preferences within the Head Start community.

INTRODUCTION

"We need to create a culture of continuous improvement in Head Start. A culture of quality."

— The Honorable Donna E. Shalala
Secretary of Health & Human Services
January 12, 1994

Purpose of This Handbook

The Head Start management team is responsible for developing and carrying out a training plan for staff, members of the Policy Council or Policy Committee, parents, volunteers, and others involved in the operation of the Head Start program. A good training plan contributes to the development of skills and knowledge needed to operate a successful and effective Head Start program, one that fully meets Head Start Program Performance Standards and the program objectives of the grantee or delegate agency. The training plan should be an integral part of the total program management.

A training plan outlines what training will take place; who will benefit; and how, when, and where the training will be conducted. This handbook provides a step-by-step guide for developing a successful Head Start training plan. It takes the reader through a ten-step, flexible planning process that lays out the important questions that need to be addressed when developing a training plan. The handbook encourages independent thinking about what training is needed, what it will accomplish, and how it will be provided.

The planning process described in the handbook is deliberately flexible. Grantees and delegate agencies can use it to stimulate their thinking about how training can enhance their own staff development and improve their programs. Head Start programs of varying size and complexity can modify the process to design a training program that fits their special needs. Experience proves that a comprehensive and well-developed training plan will produce many benefits for a Head Start program and instill the "culture of quality" that is an integral part of Head Start.

What is Training?

Training is an ongoing activity designed to increase the level of competence and expertise of staff and volunteers. It is also an effective means of helping staff, parents, and volunteers to gain a greater sense of ownership and responsibility for the program.

Learning opportunities come in many different forms and can be used for different purposes. Depending on its purpose, training can be: formal or informal; costly or inexpensive; intensive or casual. Learning can take place on the job, in a classroom, in group settings such as staff meetings or supervisor-staff discussions, or at special training conferences. Training can be provided by a supervisor, a program specialist, an outside expert, or a training consultant.

Head Start Training Is Designed To:

- Enable staff to have the knowledge and skills they need to do their work effectively, especially in each interaction with a child or family member
- Prepare staff to meet new challenges (e.g., program expansion, changes in service delivery, changing family and community needs)
- Assure that staff have opportunities to work within the Head Start program toward increasingly complex jobs requiring higher skill levels
- Address problems or concerns raised in on-site reviews

What is Effective Training?

Effective, behavior-changing training will:

- Focus on knowledge-building (i.e., providing new information) and changing behavior (i.e. developing new skills) for long-term benefits
- Provide opportunities to practice new skills and receive constructive feedback, either through in-service training or on-the-job training

These components are the essence of "skill-based" training. Skill-based training consists of a sequence of learning events that ensure participants have the opportunity to use their newly acquired skills and knowledge and to receive feedback on their performance. Because of the interrelationship between learning and practice, grantees and delegate agencies are the most appropriate settings for this type of training.

Training plans need to include a variety of learning experiences so that they can meet different needs. The learning strategy chosen may vary according to several factors, such as:

- Learning style of the participant(s)
- Number of participants
- Prior experience and/or education level of the participant(s)
- Type of skill or information to be presented

Sometimes providing information through a lecture or a workshop will meet a learning need. In other circumstances, intensive practice and feedback sessions to build participant skills and confidence may be required.

Staff development delivery strategies may include one or more of the following:

- lectures
- self-study
- college courses
- shadowing
- peer tutoring/consultation
- observing other programs
- coaching/mentoring
- on-the-job training
- video presentations
- satellite distance learning
- discussions
- role playing
- practical exercises
- group workshops

How Can a Training Plan Help?

A well-developed, strategic training plan can be of great benefit to an organization, especially when it is referred to and used on a regular basis. It facilitates the development of a learning community within Head Start. It is important, therefore, to decide how a training plan will be implemented and integrated into the overall program management and planning operations of the organization.

An effective training plan should:

- Balance the learning needs of different disciplines and program components
- Build on prior staff development, where possible
- Address learning needs systematically and periodically
- Enable programs to meet short- and long-range program objectives
- Build on staff strengths
- Offer a range of strategies for delivering training
- Allocate and spend staff development funds effectively
- Identify and use locally available resources
- Offer learning sessions in a logical order
- Be linked to college credit as appropriate

Steps for Building a Training Plan

The following steps are recommended to develop an effective training plan:

Step 1. **Determine Needs of the Program and Organization.** Review the Head Start program, particularly the program's mission, objectives and organization. Look for areas where learning opportunities can increase staff competence, enrich the program for children and families, and improve the administration of the organization.

Step 2. **Describe Expected Outcomes of Training.** Describe how the training will benefit Head Start staff, volunteers, parents, children, or the organization.

Step 3. **Set Training Priorities.** Make a list of what staff development is needed. Review the list and rank learning needs according to their importance, keeping in mind the availability of time and resources.

Step 4. **Identify Training Options, Resources Available, and Cost Estimates.** Examine the list of staff development needs and determine what resources are necessary to conduct the training. Seek out and identify different options and resources available to produce specific learning outcomes. Then estimate the cost of each option.

Step 5. **Prepare a Training Budget and Allocate Funds.** Decide which training options will be used. Estimate the costs of each training option. Prepare a detailed training budget.

Step 6. **Prepare the Final Training Plan.** Write a comprehensive training plan covering the next three to five years, accompanied by a narrative description to provide additional background information. Include in this final plan such details as learning objectives, delivery strategies, and costs.

Step 7. **Implement the Training Plan.** Prepare a schedule, assign staff responsibilities, and adopt strategies that will ensure the training is conducted according to the plan.

Step 8. **Evaluate the Staff Development Event.** Assess the learning event in terms of planning, presentation, and effectiveness. Evaluation should take place both immediately following the event and several weeks or months later, to see whether it accomplished its objectives.

Step 9. **Provide Follow-up.** After the learning event has been evaluated, it may be useful to provide follow-up. The need for follow-up training is revealed when: (1) the learning objectives have not been met; (2) staff require additional information; and (3) other staff will benefit from successful training.

Step 10. **Evaluate the Training Plan.** Evaluation of the training plan will reveal whether the overall learning objectives were met. This will help to determine whether the training strategy was successful and what adjustments, if any, need to be made to the plan or the implementation process.

STEP 1:

Determine Needs of the Program and Organization

Purpose: To find out where and how training can benefit the staff, program operations, and the organization.

Work Sheets: *#1: Program Description*

#2: Program Objectives

#3: Sources Used to Determine Organizational Training Needs

#4: Individual Staff Development Needs

#5: Organizational Training Needs

The first step in developing a training plan is to determine where and how training can benefit the Head Start program. To identify what staff development needs exist, carefully analyze the skill level of staff, the program offered to the children, and the organization.

Answering the following questions will help you analyze the program and the organization:

- What are the basic program options, service delivery strategies, and discretionary or demonstration projects operated by the program?
- What are the program's strategic objectives for the next several years? What are the objectives for this particular year? Can the staff be better prepared to help achieve those objectives?
- How can the organization benefit from additional training?
- What is the program's philosophy or approach to providing services?
- What program decisions or conditions might influence the training plan over the next three to five years? What might affect the training plan for this year?

The questions on the following pages and the work sheets in the appendix are designed to help in analyzing the program, the program objectives, and the needs of individual staff members and the organization. In completing Step 1, create two lists: one of program objectives and one of organizational needs. If the lists overlap, do not worry. Issues that appear on both will most likely be selected as priority issues to consider.

WHAT IS SPECIAL ABOUT THIS PROGRAM?

All Head Start programs share a common mission: to bring about a greater degree of social competence in children of low-income families by involving and

supporting children's families, which are perceived as the principal source of nurture and influence on the child's development.

Although they share a common mission, Head Start programs may differ in other respects. A program assessment will identify those special characteristics of the program, particularly the program's vision and objectives. What is special about a Head Start program must be identified so that the program's unique strengths, needs, and circumstances are considered in the training plan.

Work Sheet #1 – Program Description: **Describe the local Head Start program. The description should include:**

- Options offered by the program
- Size of the program (i.e., number of children served)
- Needs of the children and families served by the program
- Number of delegate agencies
- Number of centers
- Geographic location and spread
- Demographics of the community
- Age of the program
- Size of recent expansions
- Discretionary grants

WHAT ARE THE PROGRAM OBJECTIVES?

The objectives of the Head Start program should be considered when developing the training plan. Program objectives include the Head Start mission, as stated in the Program Performance Standards, and special goals and initiatives adopted by the local program.

When developing the training plan, examine all statements that relate to the program objectives. Documents that may be relevant include:

- Head Start Program Performance Standards and Guidelines
- Head Start regulations, policy interpretations, and information memoranda
- Policy Council, board, and parent committee statements and minutes
- Component plans
- Management plans
- Monitoring reports (On-Site Program Review Instrument, or OSPRI)
- Job descriptions

- Self-assessment reports (Self-Assessment Validation Instrument, or SAVI)
- Program Information Report (PIR) data
- Community and family needs assessments

The following are two examples of a Head Start program objective:

- Increase family participation in the program. Set as a goal involving the parent(s) of 75 percent of the children in at least two or more major events this program year.
- Design our program's regular Head Start services to fit the special needs of homeless families in the area.

Work Sheet #2 – Program Objectives: **Identify those program objectives that may require training. List each objective and its source.**

WHAT ARE THE ORGANIZATIONAL TRAINING NEEDS?

Determine the staff development needs of the organization. These might include learning related to management, planning, and information systems. They may also include the learning needs of the staff, volunteers, the Policy Council, board members, and parent committees.

Use on-site review reports, self-assessment results, audit reports, and staff interviews to determine organizational training needs.

Questions to Consider

While examining organizational and individual training needs, consider the questions listed below. Encourage the management team to hold a meeting and discuss these questions as a group. These questions are also appropriate for staff and parent discussions, individual interviews, and discussions about training needs with regional and national training and technical assistance providers and regional office staff.

- Do staff members have the basic skills they need to do their jobs?
- Do others in the program (e.g., the Policy Council, board members, volunteers) have the knowledge and skills they need to fulfill their responsibilities?
- Will the programs improve if staff members are retrained or their skills upgraded?
- Do new employees need training to improve their performance?
- Is high staff turnover expected? If so, how will it affect the program?
- Will some jobs change, making retraining necessary?
- Are any new positions anticipated?

- What administrative processes need improving (e.g., budgeting, record keeping, communications)? Can training bring about these improvements?
- What areas of the organization are in need of improvement, as identified through various sources and assessments (e.g., staff evaluation, self-assessment based on HSPP, Federal on-site review, evaluation of earlier training)?
- What do individual staff members identify as areas for self-improvement in various sources and assessments (e.g., staff performance evaluation)?
- Are any significant policy or regulatory changes anticipated? If so, what are they?
- What, if any, current policies or regulations are causing difficulties for the staff? Will training improve these areas?
- What plans are there for special or new initiatives (e.g., substance abuse, literacy)?
- Are any significant organizational changes anticipated? Who will this affect, and how?
- Is available technology being used? If not, why?
- What technological innovations are anticipated over the next two years (e.g., computers, interactive video)? Who will need training on the new equipment?
- Can some needs be met more effectively by training in management, organizational development, and administrative skills, rather than training in technical or program skills?
- What have been the results of previous training?
- Has the growth of Head Start created a need for the staff to have additional skills (e.g., public relations, building collaborative relationships with other agencies)?
- What are the objectives of the program's CDA (Child Development Associate) or other staff credentials?
- Do experienced staff members need refresher training (e.g., on the Head Start mission, child abuse, community problems)? If so, in what areas and how often?
- Is some training needed on an annual basis (e.g., Policy Council Training)?
- What information is available regarding new or improved "best practices" in each component and discipline (e.g., social integration of children with disabilities, multicultural strategies)?
- What are the State or local licensing requirements for staff training?

Work Sheet #3 – Sources Used to Determine Organizational Training Needs: **Check those strategies used to determine organizational training needs.**

Work Sheet #4 – Individual Staff Development Needs: **This work sheet can be completed by the employee or it can be used as a guide to interview staff about what training they think is needed.**

DETERMINE ORGANIZATIONAL TRAINING NEEDS

A variety of methods can be used to determine an organization's training needs. The following are some recommended strategies.

- Review and discuss the jobs in the program to determine what knowledge, skills, and competencies are needed by staff to perform them successfully. Pay particular attention to those positions with high turnover and jobs that are not being performed adequately.
- Ask the staff, parents, and members of the Policy Council to find out what training they believe is needed. Employees can be asked to complete an individual needs assessment form, or arrange for an employee to talk with his/her supervisor about job needs. Ask the supervisors to record their impressions and ideas.
- Talk to staff about career development. Where do individuals see themselves in the organization? Where would they like to be in three to five years?
- Review staff performance appraisals to help determine where staff skills can be improved. Do they reveal clusters of needs? Who appears to need training: the employee, the supervisor, or both?
- Review the monitoring reports (OSPRI) for clues about where improvement is needed. (For example, the monitoring team's report may include recommendations for training.)
- Anticipate staff turnover and estimate how it will affect training needs.
- Consider upcoming changes in the program (e.g., expansion, new regulations) and determine whether they will require training.
- Review the needs of the community, particularly if the community is changing.
- Use the self-assessment instruments (SAVI) and monitoring instruments (OSPRI) to conduct a program self-assessment.
- Seek input from regional office staff and regional technical assistance providers.
- Establish a training or staff development committee made up of parents and representatives of various staff groups within the organization.

Work Sheet #5 - Organizational Training Needs: **Record the organizational needs that were identified. The list should include the training needs of specific program components, as well as management.** (Note: Not all needs can be met with training. Include on Work Sheet #5 only those needs that will benefit from training.)

The Head Start Bureau encourages Head Start programs to use training for career development. Training provides Head Start staff with the knowledge and skills that enable them to take on positions of greater complexity and responsibility. Training helps the individual build personal and professional self-esteem and competence, thereby helping them to realize their professional objectives. However, all staff career development activities should directly benefit the Head Start program and help the program meet its objectives.

CREDENTIALING FOR EDUCATION STAFF

Remember to consider training and credentialing for classroom staff when determining organizational training needs. The Head Start Act of 1994 mandates that by September 30, 1996 each Head Start classroom in a center-based program must have at least one teacher who meets teacher qualifications as defined in the Head Start Act. A primary qualification is the Child Development Associate (CDA) credential.

The CDA credential is available for center-based staff working with preschool children (3-5 years) or infants and toddlers (birth to 36 months), family child care providers (birth to 5 years), and home visitors (birth to 5 years). CDA credentials are also available for other age groups, for home-based care, and for family child care. Program managers should work with staff to determine which CDA credential is appropriate for their roles and responsibilities.

Six CDA competency goals and 13 functional areas define the skills needed by providers in specific child care settings. They are the means to measure the performance of candidates during the CDA assessment process. These goals and functional areas are useful for determining staff development needs. A bilingual specialization is also available in each of these areas.

Currently there are two approaches to CDA credentialing:

- Direct assessment for candidates who have previous child care work, experience, and training
- CDA Professional Preparation Program (CDA P3), a one-year training program consisting of child development coursework and field experiences

There are a variety of options for meeting the learning requirements for the CDA. Consult with staff to select the option which best fits their needs and is available in the community. Options include:

- CDA P3 enrollment through the Council for Early Childhood Professional Recognition
- College course work
- Training provided by the local program or neighboring programs

There are several ways to meet the costs for CDA training and assessment.

- Grantees can use direct funding, quality improvement funds, and base grant funds to pay CDA costs.
- CDA candidates can pay for their own staff development and assessment.
- Scholarships are available to CDA candidates who meet income eligibility requirements. Interested candidates should contact the State administering agency or the Council for Early Childhood Professional Recognition for more information.

The CDA staff is a baseline credential for early childhood staff. It is a beginning — not an end. Development in early childhood and child development should continue beyond the CDA. When a program meets the 1996 teacher qualification requirement, the staff should continue to have opportunities for ongoing learning and development.

The Council for Early Childhood Professional Recognition is the administrative agency for the CDA National Credentialing Program. For more information on CDA requirements, contact the Council at: 1341 G Street, NW, Suite 400, Washington, D.C. 20005-3105, telephone (800) 424-4310.

Remember:

A plan of carefully designed learning opportunities for staff is a critical resource for maintaining and improving program quality.

STEP 2

Describe Expected Outcomes of Training

Purpose: To describe the outcomes expected from each training program or event. Describing what is expected from a training program or event helps to ensure that the training is realistic and appropriate for the purpose intended.

Work Sheets: *#6: Learning Outcomes*

#2: Program Objectives (for reference)

#5: Organizational Training Needs (for reference)

DEVELOP LEARNING OUTCOMES

The learning outcomes identified should:

- Describe the expected changes in behavior, attitude, performance, or knowledge level of the participants
- Be specific and measurable
- Clearly state objectives for the training

Work Sheet #6 – Learning Outcomes: **Referring to the information from Work Sheets #2 and #5, identify a learning outcome for each program objective and/or organizational need that a training program or event is expected to meet. This will help you to decide whether training is the best and most realistic option for meeting particular program and organization needs.**

When describing learning outcomes, be alert to including only those areas that training can improve. Training is sometimes used inappropriately to try to solve problems that require other solutions (e.g., ineffective communication, unclear job descriptions, or overlapping responsibilities). The following two pages offer some examples of learning outcomes.

Program/Organization Need: Children's records and grantee management systems need to be fully automated.

WHY TRAINING? It will be necessary to teach staff who work with children's records how to use computer hardware and software.

LEARNING OUTCOME: Staff who work with children's records will be able to access, use, and update the records with the automated system.

Program/Organization Need: Head Start families need interdisciplinary support and case management skills in meeting the many challenges they encounter.

WHY TRAINING? Staff members who work with families need to learn techniques and strategies that will help them to function more effectively in an interdisciplinary team.

LEARNING OUTCOME: Staff will learn, practice, and use in behalf of Head Start families the techniques needed to work as an interdisciplinary team: effective listening skills, group management, and negotiation skills, as well as information-sharing.

Program/Organization Need: The program serves children who are living in stressful environments, including substance abuse, homelessness, violence, and other tension-producing circumstances.

WHY TRAINING? The Education Coordinator, teacher, and teachers' aides need assistance in identifying the special needs of children living in stressful environments, and in providing those children with appropriate support.

LEARNING OUTCOME: The education staff will learn how to identify and carry out appropriate classroom and teaching strategies to work with children under stress, and to communicate effectively with parents living under stress.

Program/Organization Need: Meals served to Head Start children must provide one-third of their daily nutritional needs throughout the program year.

WHY TRAINING? The four new cooks lack the budgeting and planning skills necessary to provide nutritious meals within the present budget.

LEARNING OUTCOME: The cooks will learn to budget food purchases and plan their meals so that the food budget lasts through each month, while still providing the children with nutritious meals and snacks.

Program/Organization Need: The Head Start Policy Council is responsible for conducting a self-evaluation of the local Head Start program.

WHY TRAINING? New members of the council need to learn the requirements of the Performance Standards and how to use the SAVI and/or OSPRI as assessment tools.

LEARNING OUTCOME: The Head Start Policy Council will learn about the Performance Standards and how to use the SAVI and/or OSPRI to do an effective self-assessment of the program.

Program/Organization Need: Classrooms and centers must meet health and safety standards.

WHY TRAINING? Training may or may not be necessary to meet this need. For example, if the building is structurally unsound, training is not a suitable

solution. However, training may be necessary if the teachers are not familiar with good safety habits in the classroom.

LEARNING OUTCOME: Center directors and teachers will learn how to create safe classrooms and centers. They will learn how to regularly check the center, classrooms, and playground for safety.

Program/Organization Need: Families and children in the program do not have access to health care providers.

WHY TRAINING? Training may or may not be a solution to meet this need. If there are insufficient health care providers in the community, training will not meet the basic need. Where the number of health care providers is sufficient, staff training in community collaboration and building partnerships will enable program staff to help families successfully reach local providers.

LEARNING OUTCOME: Program staff will learn about community resources and how to contact them. Increased community collaboration will ensure that more children and families have access to local health care providers.

Remember:

Training cannot solve every problem or meet every need. Try to find out why a need exists, and then determine whether training is a possible solution.

STEP 3:

Set Training Priorities

Purpose: To decide what training programs will be included in the short- and long-term training plans.

Work Sheets:
#7: Ranking Learning Outcomes
#8: Setting Training Priorities
#5: Organizational Training Needs (for reference)
#6: Learning Outcomes (for reference)

Budget and time constraints are likely to limit the amount of training available. It will be necessary, therefore, to decide which training needs are most important. To start, review the list of training needs and outcomes already prepared (refer to Work Sheets #5 and #6). Consider training programs that meet both an organizational need and a program objective. Assign high priorities to training needed to meet licensing or regulatory requirements or to correct areas where the program is out of compliance.

Recognize that some training needs can only be met on a multi-year basis. Needs that can be addressed this year will be part of the first year of the training plan, with the next phase in the second year of the plan.

Work Sheet #7 – Evaluating Learning Outcomes: **Evaluate each learning outcome according to specific criteria listed on Work Sheet #7. Add or subtract criteria according to the special needs of a program.**

Work Sheet #8 – Setting Training Priorities: **Use the findings listed on Work Sheet #7 and decide into which of the following categories each learning outcome falls:**

1. **Required:** This category is for training that must be provided. If training is not provided, then some area of the program will not work properly (e.g., training to improve unsatisfactory performance of staff members or components; training to meet the requirements of Performance Standards, regulations, and licensing; and training necessary to bring the program into compliance).

   When a learning outcome receives a "yes" answer to eight or more of the questions listed on Work Sheet #7, it probably belongs in the "Required" category.

2. **Program Improvement:** This category includes training that will improve the quality of the program.

   When a learning outcome receives a "yes" answer to four-to-seven of the questions on Work Sheet #7, it probably belongs in this category.

3. **Enrichment:** This category includes training that will enrich the program and/or staff but is not essential at this time.

   If a learning outcome receives a "yes" answer to one-to-three questions on Work Sheet #7, it probably fits in this category.

These three categories are broad; use Work Sheet #7 to help set priorities among training requirements. The criteria on Work Sheet #7 are only rough indicators of training priorities. You can be flexible. For example, do not follow the results of the priority listing if you believe it is not appropriate under the circumstances.

Remember:

Your long-term training plan will likely include most of the training needs identified. Setting priorities will help you to determine what training will be conducted in the first year, what will be conducted in the second year, and so forth. It will also help to ensure that the plan follows a logical order and that training sessions build on one another as appropriate.

STEP 4:

Identify Training Options, Resources Available, and Cost Estimates

Purpose: ***To explore options for conducting high priority training programs and events and to estimate the cost of each option. This analysis will make it possible to learn how much training is feasible and at what point during the long-term training plan it might best be conducted.***

Work Sheets: *#9: Identifying Training Delivery Options*
#10: Cost Estimates for Training Delivery Options
#8: Setting Training Priorities (for reference)

IDENTIFY OPTIONS FOR DELIVERING TRAINING

To begin developing training delivery options, examine each of the priority learning outcomes. This involves understanding the needs and learning styles of the staff to be trained, what is to be learned (e.g., a skill, new knowledge), and how the program can best accommodate the training.

For each learning outcome identified on Work Sheet #8, prepare answers to the following questions (there may be more than one answer):

- Who needs to learn or improve their skills through training? What kinds of skills or knowledge do they need?
- How is the training best delivered? What alternatives are there?
  - — Using in-house staff to provide training?
  - — Using a consultant to conduct a workshop?
  - — Sending staff to a conference or staff development event?
  - — Collaborating with other agencies or organizations in the community?
- How many people need training?
- What is the learning style of the participant(s)?
- How much time is needed for the training (hours, days, weeks) and for how long (total time) to achieve the desired outcome?
- Can the training be planned and offered in stages? In one year? Over several years?
- How much of the budget can be spent on training?
- What will it "cost" not to have training (i.e., lost services, quality of services)?
- When can the training take place?

IDENTIFY AVAILABLE RESOURCES

Resources for training are available from a variety of sources. Using low-cost training resources can help stretch a training budget. Another approach is to find a partner with whom to conduct training jointly and share the cost. This option has the added benefit of building interagency relationships.

Arrange to brainstorm with the management team, staff, and Policy Council. With their help, develop a list of community resources with the potential to help meet some or all of the program's training needs. After brainstorming, list materials, resources, organizations, and providers that are available in the community. Contact the organizations and research the materials and resources further to assess what kinds of cooperative relationships might be developed to your mutual advantage.

For Example:

- Seek free or low-cost training through other Federal programs, State, or local governments, community groups, or agencies:

  — 4-H clubs
  — community health centers
  — United Way agencies
  — public school systems
  — community colleges
  — local JOBS program
  — college courses via television
  — human services offices
  — vocational education institutions
  — local JTPA program and Private Industry Council (PIC)
  — State Education Agencies
  — State child care agencies
  — extension agents and services
  — public television
  — mental health centers
  — hospitals
  — Red Cross

- Use alternative forms of training such as:

  — mentoring/coaching
  — on-the-job training
  — site visits
  — shadowing
  — role plays
  — exercises
  — competency-based training
  — videos
  — self study
  — formal courses
  — internships
  — lectures
  — group discussions
  — peer consultation

- Seek training opportunities sponsored by local affiliates of professional associations (e.g., National Association for Social Workers, National Association for the Education of Young Children, National Head Start Association).

- Explore credit-based training opportunities that might be available through local colleges and universities.
- Arrange for more experienced program staff to train other staff. If the program has the resources, consider the possibility of developing the training skills of a staff member who can then serve as a trainer.
- Explore whether other Head Start programs nearby can help to train staff.
- Seek out psychologists, social workers and other professionals who would be willing to volunteer their time — or work at a low cost — to provide technical training on stress management or family issues. Try to recruit bookkeepers or accountants who would be willing to train program staff in record-keeping and/or fiscal management.
- Collaborate with other grantees to form a training cluster and share the costs of a training program.
- Collaborate with other child care or preschool programs to arrange training commonly needed by early childhood programs (e.g., health and safety, child abuse and neglect reporting).
- Stay informed about workshops, conferences, and other training offered by the national Head Start Bureau, Regional Offices, training and technical assistance providers, and other grantees. These events can be the source of many good ideas. Remember, it is important to evaluate the training offered by these sources in terms of their contribution to the skill-based training needs of your program.

Work Sheet #9 – Identifying Training Delivery Options: **Record all the delivery options identified for each learning outcome. Try to think of more than one delivery option for each outcome.**

ESTIMATE THE COSTS

After identifying the different training delivery options, estimate the costs for each option. The box on page 21 lists some costs that need to be considered in each expense category when estimating the total cost of various options.

Review each of these cost categories, even those for "free" training. For example, a local professional contributes her time to conduct a training session on stress management. There is no cost for her time; however, she may ask to have materials photocopied for the participants, or seek reimbursement for such out-of-pocket costs as transportation to the training site.

In-house and local training is usually less expensive than formal training courses, college courses, or training requiring substantial travel. When developing the training plan, consider the costs of different training delivery options.

Work Sheet #10 – Cost Estimates for Training Delivery Options: **Estimate and record the cost of each learning outcome identified on Work Sheet #9. Use the guide on the next page to ensure that all possible costs have been considered.**

Remember:

You can get more "bang for the buck" if you think creatively about ways to utilize existing community resources.

Training Costs Guide

Course Fees:

$ _____ How much is the registration fee, course fee, or tuition for the staff development event?

Trainer or Consultant Fees:

$ _____ What is the trainer's or consultant's hourly, daily, or weekly fee?

$ _____ Does the trainer or consultant charge for time spent preparing and planning for the training? If so, how much?

Materials:

$ _____ Are there handbooks, manuals, or other course materials associated with the training? Are they required or recommended? How much do they cost? Does each trainee need a copy, or can they share?

$ _____ Will the training require printing or photocopying of materials? If so, how much will these services cost? Are they included in the consultant's or trainer's fees?

$ _____ Will the learning require funds to support interactive technology (e.g., satellite time, computer on-line time, or audio-visual conferencing)?

$ _____ Will the consultant or trainer need audio or visual aids (e.g., flip charts, overhead projector and slides, VCR and TV)? How much will it cost to purchase or rent these items?

$ _____ Will other miscellaneous materials be needed (e.g., name tags, paper and pens, toys, or games)? If so, what is the cost?

$ _____ Will refreshments be needed (e.g., coffee, tea, snacks)? If so, what is the cost?

Continued on Next Page

Space:

$ _____ Can the training be provided in a center? If not, will other space need to be rented? Will adult chairs need to be rented? Is there space to write? Are there break-outrooms? What is the cost for space?

$ _____ Will it be necessary to provide child care on-site? Are the necessary space and resources available? What is the cost?

Travel:

$ _____ If the training will require the staff to travel, what will be the cost of the travel, including mileage, per diem, and lodging?

$ _____ If the consultants or trainers are from out of town, what will their travel, lodging, and per diem expenses total? Are the travel costs covered separately or included in the contract?

$ _____ If parents and volunteers will be included in the learning event, will they have transportation or parking expenses? Will they need baby-sitting or day care services? Are they eligible to be reimbursed for these expenses?

Staff Time/Substitutes:

$ _____ Will some employees involved in the training need to be replaced by substitute staff? How much will the substitutes cost?

$ _____ How much time will managers and staff need to spend to follow-up on the training? What is the cost?

$ _____ If follow-up training or assistance will be needed, what will the time and travel cost?

$ _____ If training occurs outside of regular working hours, will participants need compensation for their time? What is the cost?

STEP 5:

Develop a Budget and Allocate Funding

Purpose: ***To develop a budget that will meet priority training needs, and to set aside funds from the program budget and other sources to pay for the training.***

Work Sheets: *#11: Training Budget*
#10: Cost Estimates for Training Delivery Options (for reference)

Because training is only one of many expenses associated with operating a Head Start program, it is important to budget the funds necessary to meet priority learning outcomes. Include projected training costs as part of the annual funding request.

Prepare a training budget based on the availability of funds from different sources including:

- The basic Head Start grant
- Supplemental program funds (including quality improvement, expansion, and program improvement)
- Direct funding (PA 20)
- In-kind donations, scholarships, and contributions from the community, foundations, and State and local governments

The basic grant should be the foundation of the training budget. Direct funding (PA 20) should be used as a supplemental source to pay for training expenditures. In addition to the basic grant, certain on-going and supplemental funds may be used for training. The availability of these funds changes from year to year, both in terms of the amount and when they become available. When available, however, these funds can significantly enhance training budgets. Examples include:

- *Quality Improvement Funds.* These funds may be used to provide training to improve staff qualifications and to support staff training. Through such training, staff can better address the problems facing Head Start children, including chronic violence in their communities and children whose families experience substance abuse.
- *Expansion/Start-up Funds.* If the training is a one-time expense associated with the grantee's plans for expansion, these funds can be used to train new employees. Expansion/Start-up funds are also available for new grantees.

- *Program Improvement Funds.* These funds are available to provide training that is designed to strengthen the management and leadership capacity of Head Start management staff, as well as other components. Program Improvement Funds are awarded on a competitive basis, do not become part of the basic grant, and may not always be available.

Work Sheet #11 – Training Budget: **Determine how much of the program budget will be allocated for training. Refer back to the cost estimates on Work Sheet #10 to determine the cost of meeting training needs. If the program's training needs cannot be met within the current level of funding, then additional funds should be sought, such as foundation grants, State and local resources, in-kind contributions, or volunteer contributions.**

Remember:

Use your training delivery options and cost estimates (Work Sheets #9 and #10) when allocating scarce training resources to help determine which staff development events will be covered by the program budget and which might be covered through foundation grants, collaborative training arrangements, in-kind contributions, or volunteer contributions.

STEP 6:

Prepare the Final Training Plan

Purpose: To develop a comprehensive, strategic training plan for the next three-to-five years, accompanied by a narrative to document the planning process. The plan will help the program to manage its training budget and ensure that training occurs.

Work Sheets: **#12: Final Training Plan**
#13: Training Plan Narrative

Once learning outcomes have been developed, prioritized, delivery options selected, and a budget developed, a formal training plan should be written. The training plan should be comprehensive and outline training expectations over the next three-to-five years. In preparing the plan, include the following information:

1. Period of time covered by the training plan
2. Grantee name, number, and region
3. Contact person and phone number
4. Total training budget from various sources
5. Methods used to assess training needs

In addition, include the following information for each anticipated learning event:

1. Focus of the learning event and the expected outcome
2. Approximate dates of learning event and duration
3. Preliminary location of learning event and any travel that may be involved
4. Estimated number of participants
5. Type of learning event (e.g., workshop, lecture)
6. Provider (e.g., in-house, consultant)
7. Cost (total dollar amount)
8. Funding source(s) (PA 20, PA 22, or other)
9. Contact person

You should also prepare a more detailed description of the learning events planned for the current year, including:

- Specific date(s) and location
- Name of provider
- Name of participant(s)
- Details regarding implementation (as outlined in Step 7)

A narrative description should be attached to the training plan. This training plan narrative should describe how your training needs and the proposed learning events relate to the Performance Standards, your program objectives, and organizational needs. It also documents the process used to develop the training plan and the framework within which decisions were made.

Work Sheet #12 – Final Training Plan: **Develop a timetable for training over the next three-to-five years, based on priority training needs and funding availability. Describe each learning event that will be offered.**

Work Sheet #13 – Training Plan Narrative: **Summarize the process used to develop the training plan and describe how the training plan relates to the Performance Standards, your program objectives, and organizational needs. Attach the narrative description to Work Sheet #12.**

As the training plan is being finalized, answer the following questions to make sure that the plan is comprehensive and will meet the needs of the program and staff:

- Does the training plan focus first on meeting the essentials of the Head Start program and fulfilling the Program Performance Standards?
- Will the training plan help staff to gain the skills they need to perform their jobs well?
- Does the training plan identify and provide the training required in the Program Performance Standards?
- Does the training plan include training for staff, volunteers, the Policy Council, grantee board members, and parent committees?
- Does the training plan ensure that everyone involved in the substantive issues of the local program will understand Head Start and have the skills necessary to successfully perform their roles in implementing the Head Start program in their local community?
- Will the plan meet the priority training needs identified?
- Does the plan include the training necessary to meet the 1996 rule for a CDA or equivalent credentialed teacher in each classroom? Note how many teachers will be enrolled in CDA or equivalent programs in the year 1996 and each

year thereafter. (Training for additional classroom staff may be considered to ensure that the objective is met even if the classroom staff has had some turnover.)

- Does the plan meet State special education requirements and the new Performance Standards for serving children with disabilities?
- Is there someone identified who will be responsible for ensuring that each learning event occurs?
- Is the training plan balanced, and does it consider the needs of the full program?
- Is the training plan reasonable and based upon an assessment of total staff needs?
- Does the plan utilize existing training programs and other resources in the agency or the community?
- Are the objectives attainable within the proposed timeframe of the plan?
- Does the plan consider the developmental training level of the participants and their learning style(s)?
- Does the plan support program goals for staff development?
- Has a date been established for re-evaluating the training plan?

Remember:

The Final Training Plan provides an overall framework for assessing your program and staff needs, planning your budget requests, and ensuring that resources are used to their maximum advantage in meeting program needs.

STEP 7:

Carry Out the Training Plan

Purpose: ***To put training plans into action.***

Work Sheets: *#14: Training Tracking Form*
#15: Consultant/Trainer Agreement

ASSIGN RESPONSIBILITY FOR IMPLEMENTATION

The training plan should be incorporated into other management and component plans. To ensure that the training plan is carried out, assign someone the responsibility for implementing each learning event. Other strategies include:

- Asking one person (or a team) to implement the entire plan
- Assigning the staff development committee (if there is one) to work as a group to ensure that the training is provided
- Asking for volunteers
- Assigning the responsibility to the appropriate component coordinator(s)

Consider using one or more of the following strategies to facilitate carrying out the training plan:

- Write and post a training calendar for the year. Make sure all learning events are included and that the calendar is posted in a visible area.
- Block out a regularly scheduled time for training. Set aside one day each week or each month for training and other staff development activities.
- Integrate the training plan into component and management plans.
- Include training in staff job descriptions and performance appraisals, to ensure that all staff recognize that training is one of their job responsibilities.
- Develop training or learning contracts with individual staff members.
- Schedule a time (e.g., every six months) when the training plan will evaluated and updated as necessary.

Work Sheet #14 – Training Tracking Form: **Document each learning event as it is carried out.**

The person(s) responsible for carrying out the training plan for each learning event must consider all aspects of the training.

ARRANGE FOR EACH LEARNING EVENT

To arrange for a learning event, the person(s) in charge of planning training must:

- Contact the trainer:
  - Discuss the expectations and objectives of the training
  - Discuss and negotiate costs
  - Select the date and time for training

Work Sheet #15 – Consultant/Trainer Agreement: **Negotiate and record these arrangements when a consultant or outside trainer will provide the training.**

- Select and reserve an appropriate location:
  - Is there adequate space for activities (group discussions, breakouts, childcare)?
  - Is the location available, accessible, and affordable?

- Make other necessary arrangements:
  - Purchase or duplicate materials, handouts, audio/visual aids, and so forth
  - If training will be conducted during the Head Start day, arrange for substitute staff
  - If travel is necessary, help participants make travel arrangements
  - Arrange for technological support systems to be available

- Prepare participants:
  - Notify participants in advance regarding the location, time, learning objectives, and any special preparations needed

- Set up the facility:
  - Arrange the room and space according to the request of the provider/trainer
  - Locate and set up any necessary equipment (e.g., chalkboard and chalk, flip chart and markers, projector, television, VCR)
  - Check out the operation of any equipment and make sure everything works
  - Prepare and have ready sign-in sheets, agendas, name badges, training materials, and evaluations

- Meet with the trainer:
  - Confirm that the room and equipment are set up according to his/her wishes

- Discuss the agreed-upon objectives for the training
- Discuss and finalize the agenda

- Follow-up:
  - Collect evaluation forms at the end of the session
  - Record the costs of the training and complete the voucher
  - Document that the training occurred, including date, time, and person(s) trained
  - Analyze the evaluations, file them, and discuss potential follow-up

PREPARE PARTICIPANTS

In advance of the training, inform participants about what to expect. As far in advance as possible, make certain participants:

- Know the staff development event(s) in which they will be participating and why
- Know the objective(s) of the training
- Have made any necessary arrangements (e.g., childcare, substitute staff, transportation)
- Know what materials and information they need to bring to the training
- Are aware of any special requirements of the training (i.e., homework)
- Know the time and location of the training, including how to get there

Remember:

The greatest training plan in the world is nothing without adequate implementation.

STEP 8:

Evaluate the Staff Development Events

Purpose: ***To learn the degree to which training accomplished its objectives and how it could be improved.***

Work Sheets: **#16: Training Evaluation: Participants**
#17: Training Evaluation: Program

Did the Training Accomplish Its Objectives?

It is important to evaluate training and determine the extent to which it achieved its objectives. The results of the evaluation will be valuable when planning subsequent learning events to reinforce and enhance skills.

- Did the participants learn the knowledge and skills that the training was supposed to provide?
- Do the participants use the knowledge and skills gained in the training?
- Has there been a behavioral change in the participants?
- Did the knowledge and skills gained by participants meet the organization's need?
- Is more training or additional help needed in order to benefit from the training more fully?
- How successful was the learning event?

How Successful Was the Actual Training Event?

The results of this assessment will be helpful in determining the need for future training, follow-up activities, and/or technical assistance.

- Was the trainer interesting?
- Did participants feel that they learned something?
- How were the facilities?
- Was the training too long or too short?
- Was the training format appropriate?

METHODS FOR ASSESSING TRAINING

Evaluate training both immediately following the learning event and a few weeks or months later to see if it accomplished its objectives. One or more of the following methods may be useful:

- *Simulation:* The trainer is brought back to assess participants. Participants should use their new skills in one or both of the following simulations.
  - Practical Exercise: Ask participants to do a task that they regularly do on their job.
  - Role Playing: Participants are asked to play interactive roles similar to those in which they might find themselves on the job.
- *On-the-Job Training Test:* The participant's supervisor or manager assesses their skill and ability during the performance of their jobs.
- *Participant Response:* Ask the participants if they can use what they learned. Ask the participants if they thought the training was useful and how it has helped them to improve.
- *Observation:* A supervisor, manager, or consultant is asked to observe participants in their jobs to see how they are applying the skills and knowledge learned during the training. Observe the participants to see if they have a better understanding of the job or if they can handle particular tasks learned in the training.
- *Anecdotes:* Collect anecdotal observations by a third party (not listed above) to discern whether the participants have learned the material.
- *Written Tests:* Use multiple choice, true/false, essay questions, or fill-in-the blank tests to measure the extent to which participants remember material presented in the training. Use this method only where the participants need to know and recall specific information to do their jobs.
- *Oral Reports:* Listen for comments from individual participants at the end of the training session, or as part of a group discussion.
- *Written Reports:* Ask participants to complete written evaluations and/or questionnaires.

Work Sheet #16 – Training Evaluation – Participant: **Ask participants to evaluate the training event on this evaluation form.**

Work Sheet #17 – Training Evaluation – Program: **This evaluation form should be completed by the staff person responsible for overseeing the event, a member of the management team, or other designated program administrator.**

Remember:

Evaluating each staff development event helps to ensure that the training is both interesting and effective.

STEP 9

Provide Follow-Up

Reinforce training with practice, observation, information, and feedback. Without follow-up, the benefits of training may quickly be forgotten or never used.

After evaluating the training, assess what impact the training had on staff and the total program and identify the need for follow-up activities.

- If the training accomplished its objectives, try to learn what can be done to help participants maintain their new levels of knowledge and skill.
- If the training did not accomplish its objectives, try to learn why. Do the participants need more training? Was training the right solution? Is something else needed?

Training can be followed up in many ways, such as:

- Coaching/mentoring
- Consultation and supportive supervision
- Technical assistance and problem solving
- Additional information — articles, work sheets, and so forth
- Observed practice with feedback
- Peer consultation
- Formal coursework in institution of higher learning
- Additional structured opportunities to practice new skills and receive feedback

During follow-up, feed the results of the training evaluation back into the training planning process. This includes information on who has been trained, in what areas and skills, how well different types of training worked for particular staff positions, and what other training or technical assistance might be needed.

Remember:

Reinforcing the training with follow-up is important in maintaining increased levels of knowledge and skill.

STEP 10

Evaluate the Training Plan

Purpose: ***To determine the degree to which the training plan accomplished its objectives and how it could be improved.***

Is the Training Plan Accomplishing Its Goal?

In addition to evaluating each learning event, it is important to evaluate the training plan itself to determine the extent to which it is achieving its goals. The results of the evaluation will enable you to make any adjustments to the plan that may be necessary.

Training alone is not a solution to most problems. Therefore, when evaluating training and the training plan, it is important to be aware of what training can reasonably accomplish and acknowledge that other factors may determine whether a program objective or organizational need can be met.

It is also important to distinguish between the conceptual basis of the training plan and its implementation. A learning event may not fulfill expectations because of logistical problems. It is possible to have a good training plan that failed to meet expectations simply because it was poorly implemented.

Questions to Consider

- Did the learning events accomplish their purpose?
- Are participants applying the new knowledge and skills in their jobs?
- Was training the most appropriate solution to the problem?
- Were the training sessions evaluated by both the participants and the management team representative? Were the sessions found to be appropriate and useful?
- What kind of follow-up has taken place? Are there any improvements that could be made in this area?
- Were the training sessions held according to schedule? If not, why not?
- How effectively were the training sessions implemented? Are there aspects of the implementation that need to be handled differently? If so, what changes should be made?
- Are the lines of responsibility for implementing the training plan clear?
- Have any new training needs been identified?

- Are there any new environmental factors that need to be taken into consideration (e.g., budget cuts, program changes, significant staff changes)?
- Is the program now in compliance with Performance Standards?

Work Sheet: #18 – Evaluation of Training Plan

Remember:

If your training plan doesn't seem to be meeting your expectations, check to be sure that training will solve the problem and that training has been implemented effectively.

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